accenture

**Student Aid Awareness
Organizational Roles & Responsibilities**
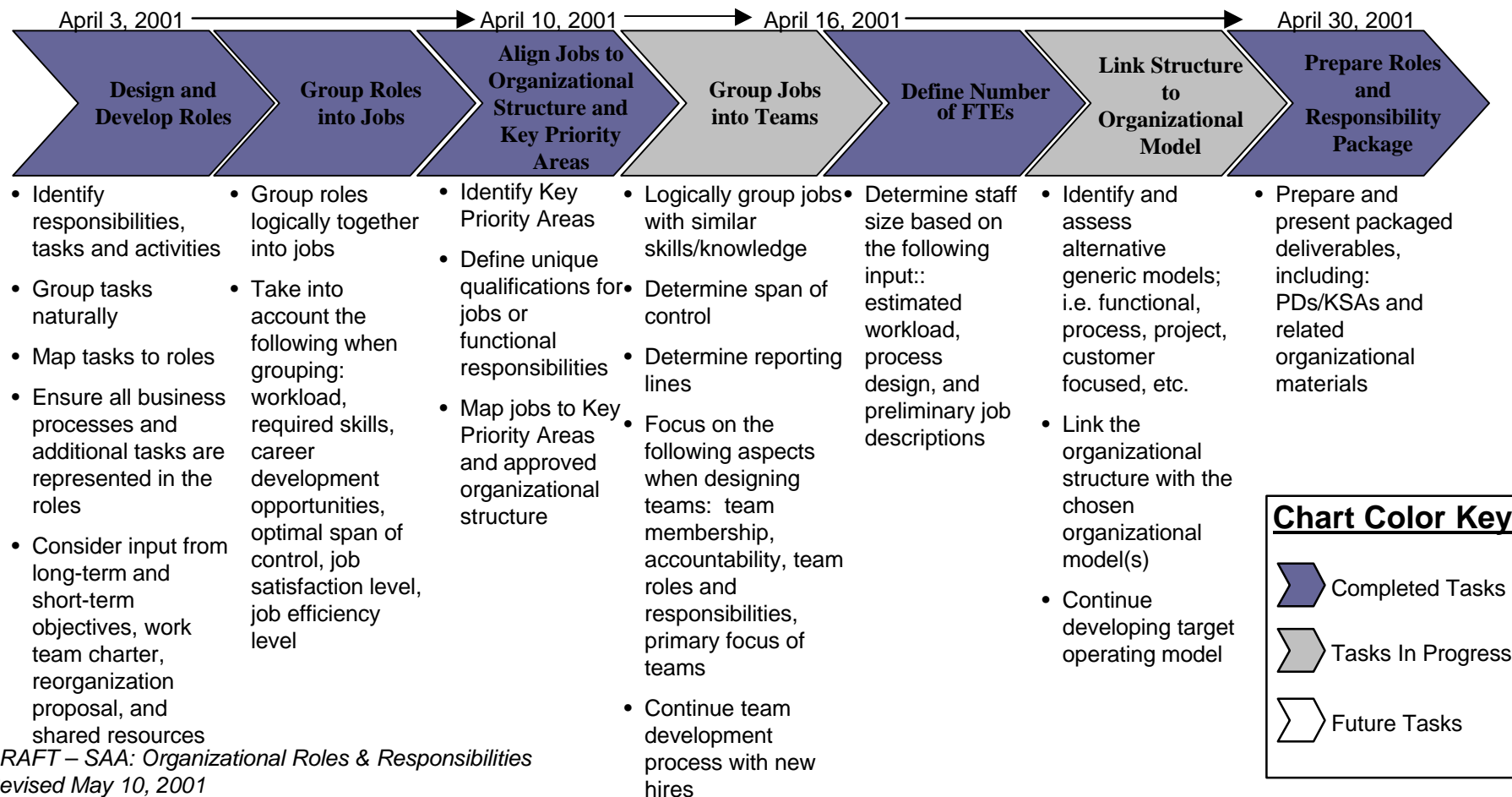
Revised May 10, 2001

Context

This document represents the results of the organizational roles and responsibility process for Student Aid Awareness. Accenture facilitated working sessions with the Student Aid Awareness leadership team to examine the roles necessary to implement the approved organizational structure and key priority areas. This outline illustrates the design process:
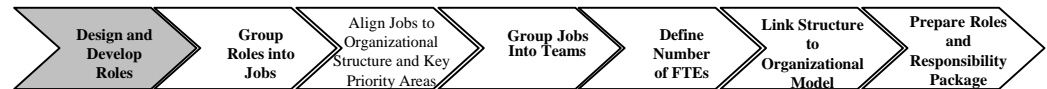
- Project Plan

- Role Design

- Job Design

- Organizational Structure

  - Align Jobs to Organizational Structure and Key Priority Areas

  - Group Jobs into Teams

  - Determine Number of FTEs

  - Link Structure to Organizational Model

- Next Steps

Project Plan

The project planning process outlined below identifies the sequence of events taken for the Student Aid Awareness leadership team to arrive at the proposed operating model for their approved organizational structure.

April 3, 2001 ──────→ April 10, 2001 ──────→ April 16, 2001 ──────→ April 30, 2001

| Design and Develop Roles | Group Roles into Jobs | Align Jobs to Organizational Structure and Key Priority Areas | Group Jobs into Teams | Define Number of FTEs | Link Structure to Organizational Model | Prepare Roles and Responsibility Package |

Design and Develop Roles
- Identify responsibilities, tasks and activities
- Group tasks naturally
- Map tasks to roles
- Ensure all business processes and additional tasks are represented in the roles
- Consider input from long-term and short-term objectives, work team charter, reorganization proposal, and shared resources

Group Roles into Jobs
- Group roles logically together into jobs
- Take into account the following when grouping: workload, required skills, career development opportunities, optimal span of control, job satisfaction level, job efficiency level

Align Jobs to Organizational Structure and Key Priority Areas
- Identify Key Priority Areas
- Define unique qualifications for jobs or functional responsibilities
- Map jobs to Key Priority Areas and approved organizational structure

Group Jobs into Teams
- Logically group jobs with similar skills/knowledge
- Determine span of control
- Determine reporting lines
- Focus on the following aspects when designing teams: team membership, accountability, team roles and responsibilities, primary focus of teams
- Continue team development process with new hires

Define Number of FTEs
- Determine staff size based on the following input:: estimated workload, process design, and preliminary job descriptions

Link Structure to Organizational Model
- Identify and assess alternative generic models; i.e. functional, process, project, customer focused, etc.
- Link the organizational structure with the chosen organizational model(s)
- Continue developing target operating model

Prepare Roles and Responsibility Package
- Prepare and present packaged deliverables, including: PDs/KSAs and related organizational materials

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Chart Color Key

- Completed Tasks
- Tasks In Progress
- Future Tasks

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3

Design and Develop Roles

Role design is the process of identifying and grouping tasks, activities and responsibilities into roles. An effective role is one that makes sense to the employee, enables desired behaviors, and helps the organization meet its business objectives.

Some Tasks Identified by SAA Leadership

- Conduct workshops on a variety of related topics
- Analyze info/feedback to make decisions about direction
- Identify, organize and arrange partnering activities
- Recognize opportunities for partnerships – prospecting
- Maintain a library of analyses/research already conducted
- Draft, edit, proofread general and technical information
- Monitor contractor performance
- Educate potential program participants
- Conduct and/or coordinate study, surveys and focus groups
- Manage data, database models and other analytical tools
- Review and utilize market analysis
- Research and compile info on non-federal student aid activities
- Develop and manage campaign management
- Develop cost effective strategies
- Report on performance indicators and quality metrics
- Ability to apply training methods & develop training modules
- Identify emerging issues and evaluate significant trends
- Apply statistical theories and methodologies
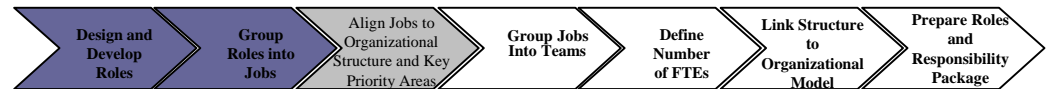- Analyze data through artificial intelligence
- ETC…

Tasks Mapped to Roles

- **Office Automation Clerk**
- **Publications Specialist**
- **Senior Analyst**
- **Financial Analyst**
- **"Marketing" Outreach**
- **Research Specialist**
- **Relationship Manager**
- **Program Manager**
- **Training Analyst**
- **Office Manager**
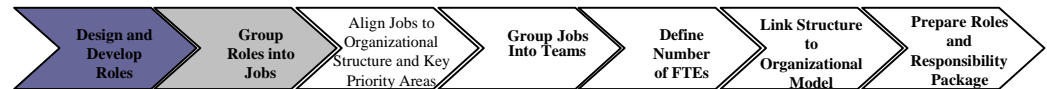
Group Roles into Jobs

Once the roles are identified and agreed upon, they need to be grouped logically together into jobs. Certain considerations have to be taken into account during job design: workload, required skills, span of control, career development opportunities and job satisfaction levels.

ROLES

- Office Automation Clerk
- Publications Specialist
- Senior Analyst
- Financial Analyst
- "Marketing" Outreach
- Research Specialist
- Relationship Manager
- Program Manager
- Training Analyst
- Office Manager

JOBS

- Office Automation Clerk
- Public Information Specialist
- Mgmt & Program Analyst
- Outreach Specialist
- Education Research Specialist
- Administrative Specialist
- Branch Managers
- Director

Title/Series

- Office Automation Clerk (0326)
- Writers/Editors (1082)
- Mgmt & Program Analysts (0343)
- Education Research Specialist (1730)
- Program Manager (0340)
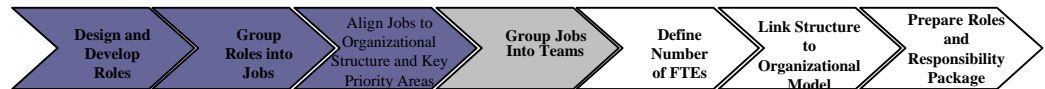- Director (SES)

Align Jobs to Organizational Objectives

This step outlines the process of mapping jobs into the key priority areas, identified by the Student Aid Awareness leadership team, to the approved organizational structure. As noted by this chart, all managers are responsible for building and maintaining an energized workforce.

Key Priority Areas → Organizational Structure	Target Aid Information To Populations That Need it Most	Establish Partnerships To Promote Access To Post-Secondary Education	Energized Workforce And Leadership	Campaign Management Information System
Immediate Office	Office Auto. Clerk

Mgmt. & Program Analyst | | Manager | → → |
| Program Outreach | | Mgmt. & Program Analyst | Manager | |
| Program Information & Publications | Writer/Editor

Mgmt. & Program Analyst | | Manager | |
| Student Population Research | Education Research Specialist

Mgmt. & Program Analyst | | Manager | CRM Mgmt. & Program Analyst |

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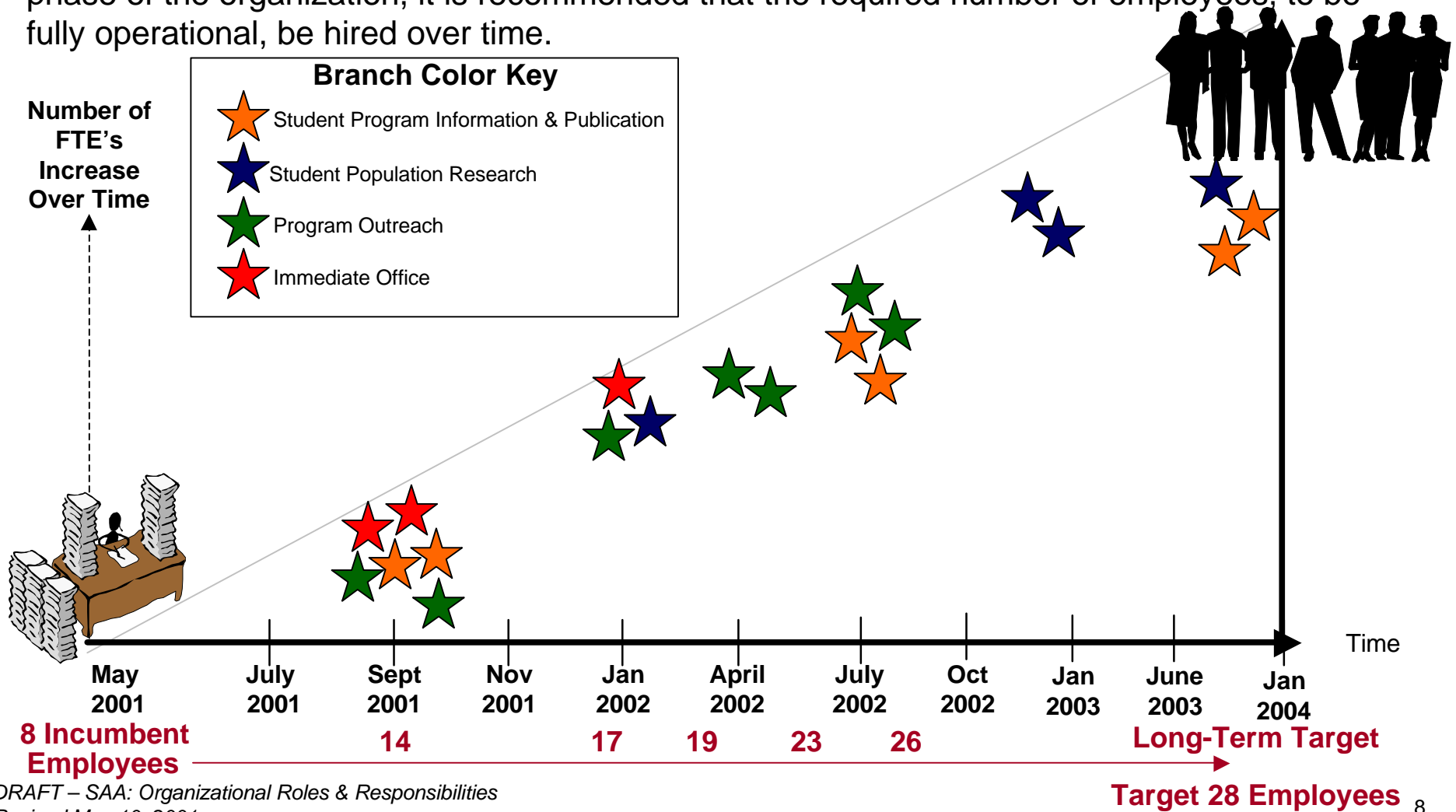*Revised May 10, 2001*

Group Jobs Into Teams

Position Titles & Organization	Incumbent Positions	Short-Term (FY-01) Position Staffing Request	Long-Term (FY-04) Position Staffing Request
IMMEDIATE OFFICE			
Director	1	1	1
Office Automation Clerk	0	1	1
Mgmt. & Program Analyst	0	1	1
PROGRAM OUTREACH			
Program Outreach Manager	1	1	1
Mgmt. & Program Analyst	0	5	9
PROGRAM INFO & PUBLICATIONS			
Pgm. Info & Publications Manager	1	1	1
Mgmt. & Program Analyst	2	2	4
Writer/Editor	3	5	5
STUDENT POPULATION RESEARCH			
Student Population Research Manager	1	1	1
Education Research Specialist	0	1	2
Mgmt. & Program Analyst	0	2	2
TOTALS	**9**	**21**	**28**

Define Number of FTEs

The next step is to size the organization, to determine the number of Full Time Employees (FTEs) needed to process the workload. Given the current hiring challenges and the start-up phase of the organization, it is recommended that the required number of employees, to be fully operational, be hired over time.

Number of FTE's Increase Over Time

Branch Color Key
- ★ Student Program Information & Publication
- ★ Student Population Research
- ★ Program Outreach
- ★ Immediate Office

Time

| May 2001 | July 2001 | Sept 2001 | Nov 2001 | Jan 2002 | April 2002 | July 2002 | Oct 2002 | Jan 2003 | June 2003 | Jan 2004 |

8 Incumbent Employees → **14** **17** **19** **23** **26** **Long-Term Target**

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Target 28 Employees

8

Link Structure to Organizational Model

An organizational model is the physical arrangement of the new and/or modified structure that best supports the business goals, objectives, and processes. Organizations follow a lifecycle of models depending on where they are in the evolution process. Student Aid Awareness is proposing a flexible model where teams will work together on various projects, and would like to eventually work toward a matrix organization that is customer focused.
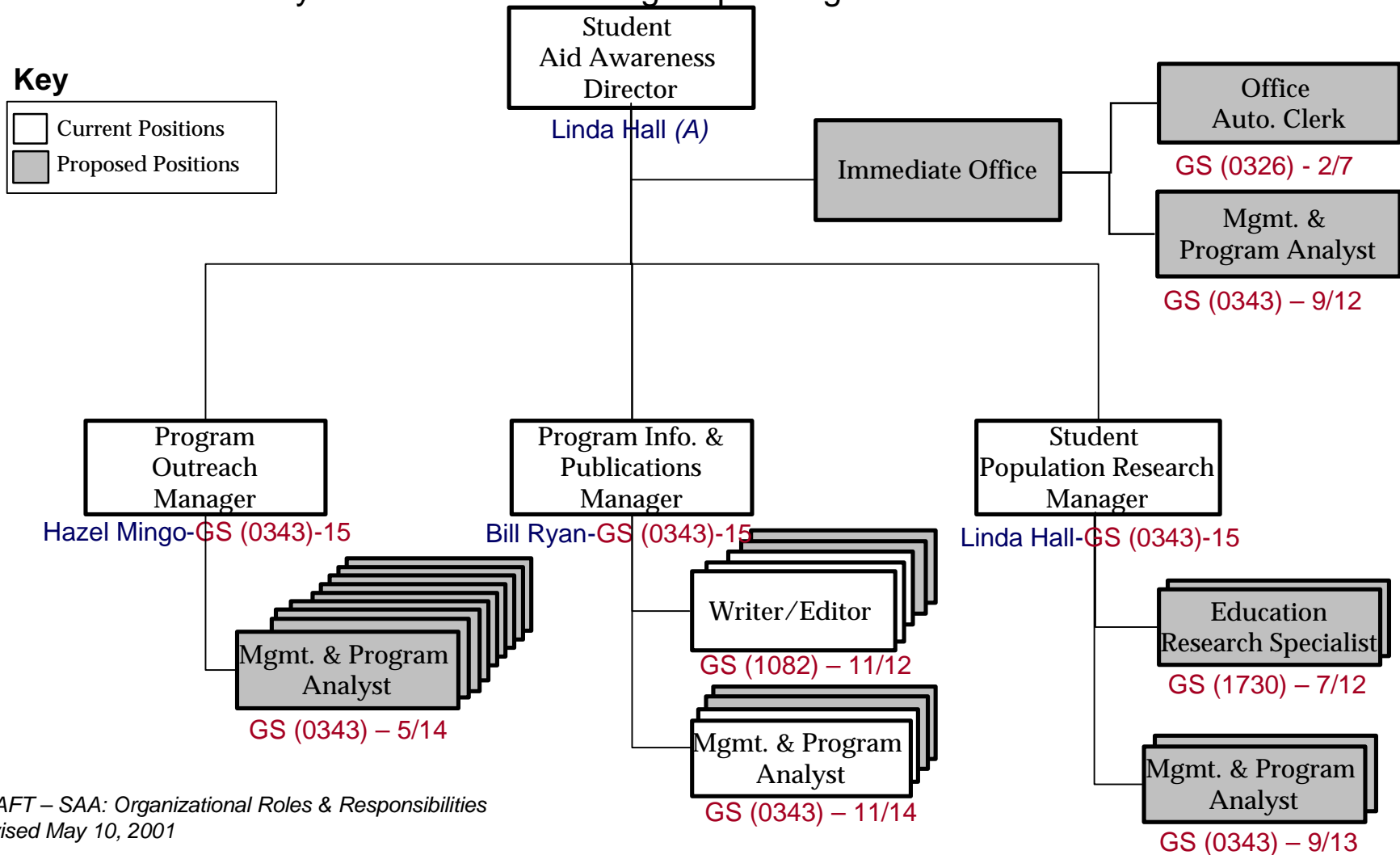
Highly STRUCTURED Organization   **Highly FLEXIBLE Organization**

FUNCTIONAL   **PROCESS**   **MATRIX**   **CUSTOMER FOCUSED**   **TEAM/PROJECT BASED**

Functional - Traditional organization structure where responsibility rests with the top manager. Each functional area has its own expertise and reporting relationships and responsibilities.
(Example: Department of Education)

Process - An organization structure is designed by each major process. "Process owners" are identified for a process. Traditional reporting relationships are eliminated.
(Example: Defense Logistic Agency)

Matrix - A functional and product manager shares reporting responsibility for performance. Allows for a collaboration and blending of skills to provide customer-focused results.
(Example: Accenture)

Customer-Focused - Focus is client-oriented, typical of service culture organizations that want a partnering customer relationship that is consultative and communicative. The structure is typically decentralized.
(Example: Nordstrom)

Project – This structure combines representatives from specialties onto project or client teams.
(Example: Student Aid Awareness)
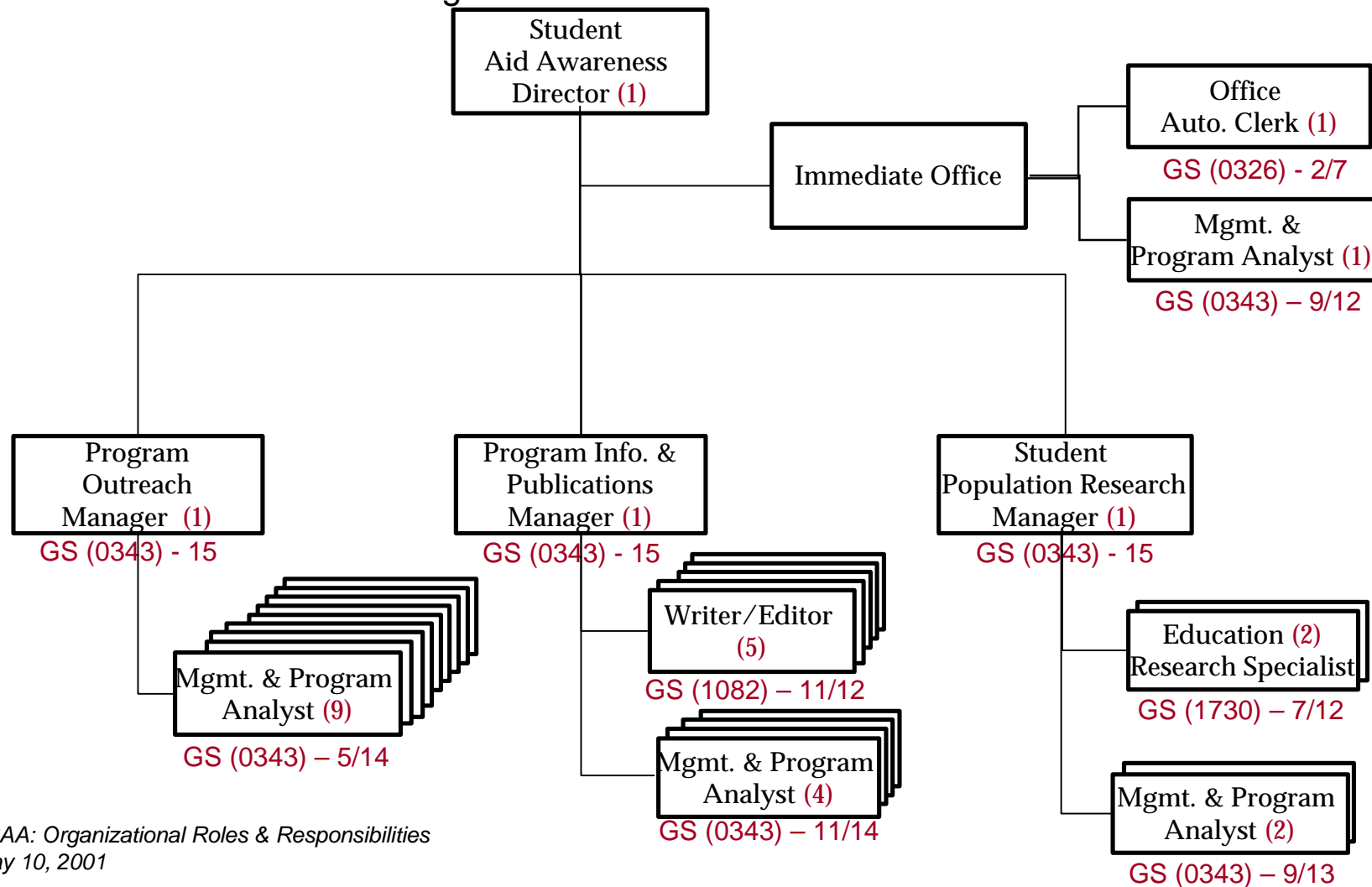
Organizational Lifecycle

Current Organizational Structure

Student Aid Awareness's current organizational structure consists of 9 positions staffed by 8 people as indicated in this organizational chart. It is proposed that 20 additional staff be hired over the next three years to reach their target operating state.

Key

☐	Current Positions
▨	Proposed Positions

Student Aid Awareness Director
Linda Hall *(A)*

Immediate Office

Office Auto. Clerk
GS (0326) - 2/7

Mgmt. & Program Analyst
GS (0343) – 9/12

Program Outreach Manager
Hazel Mingo-GS (0343)-15

Mgmt. & Program Analyst
GS (0343) – 5/14

Program Info. & Publications Manager
Bill Ryan-GS (0343)-15

Writer/Editor
GS (1082) – 11/12

Mgmt. & Program Analyst
GS (0343) – 11/14

Student Population Research Manager
Linda Hall-GS (0343)-15

Education Research Specialist
GS (1730) – 7/12

Mgmt. & Program Analyst
GS (0343) – 9/13

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Revised May 10, 2001

10

Approved Organizational Structure

Student Aid Awareness's approved organizational structure requires 20 additional staff to successfully meet it's business objectives. It is proposed that the additional staff be hired over time to create a flexible and energized workforce.

Student Aid Awareness Director (1)

Immediate Office

Office Auto. Clerk (1)
GS (0326) - 2/7

Mgmt. & Program Analyst (1)
GS (0343) – 9/12

Program Outreach Manager (1)
GS (0343) - 15

Mgmt. & Program Analyst (9)
GS (0343) – 5/14

Program Info. & Publications Manager (1)
GS (0343) - 15

Writer/Editor (5)
GS (1082) – 11/12

Mgmt. & Program Analyst (4)
GS (0343) – 11/14

Student Population Research Manager (1)
GS (0343) - 15

Education (2) Research Specialist
GS (1730) – 7/12

Mgmt. & Program Analyst (2)
GS (0343) – 9/13

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Revised May 10, 2001

11

Next Steps

- Conduct Weekly SAA Management Meetings
  - Further develop FY01' action plans
  - Utilize project management tools for communication, tracking and reporting
  - Identify business processes for programs in place and for start-up projects

- Work on Individual and Team Development
  - Identify individual development needs
  - Conduct team development workshops and environment

- Develop Organizational Structure
  - Communicate new organization to key stakeholders
  - Create Liaison relationships with other teams to identifying overlapping and complimentary tasks and activities to the mission of SAA
  - Develop operating organizational model